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FinancialPlanning

# Retirement

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If you're lucky, you'll retire with a long and healthy road ahead of you. But also, a solid plan for how to manage healthcare, which can be difficult to understand.

This week, Rob Burgess put together a couple stories for how to best advise clients on longterm health questions. Don't miss the checklist, which lays out all the steps you'll need to consider.

That, and more, below. Thanks for reading.

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TOP STORIES

PRACTICE AND CLIENT MANAGEMENT

# How to help clients plan for the high costs of long-term health care

Part of clients' anxiety about this issue stems from the uncertainty of how much or how long such health care expenses will be incurred.

- **A health care planning checklist for financial advisors**
  Insurance, emergency savings and estate planning documents are among the topics advisors should consider reviewing with clients.
- **The financial advisor's guide to Medicare**
  Medicare is a minefield of deadlines, penalties and the potential for disastrous mistakes. Here's how wealth managers can guide their clients to safety.
- **Traditional vs. Roth 401(k) and how best to leverage an HSA**
  Cash flow, tax bracket and timing of distributions will determine whether pretax or post-tax treatment of retirement savings makes more sense.
- **20 best cities for retirement**

Orlando, Florida, ranks as the top city for retirement due to a lower tax rate and a large amount of recreational activities.

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